



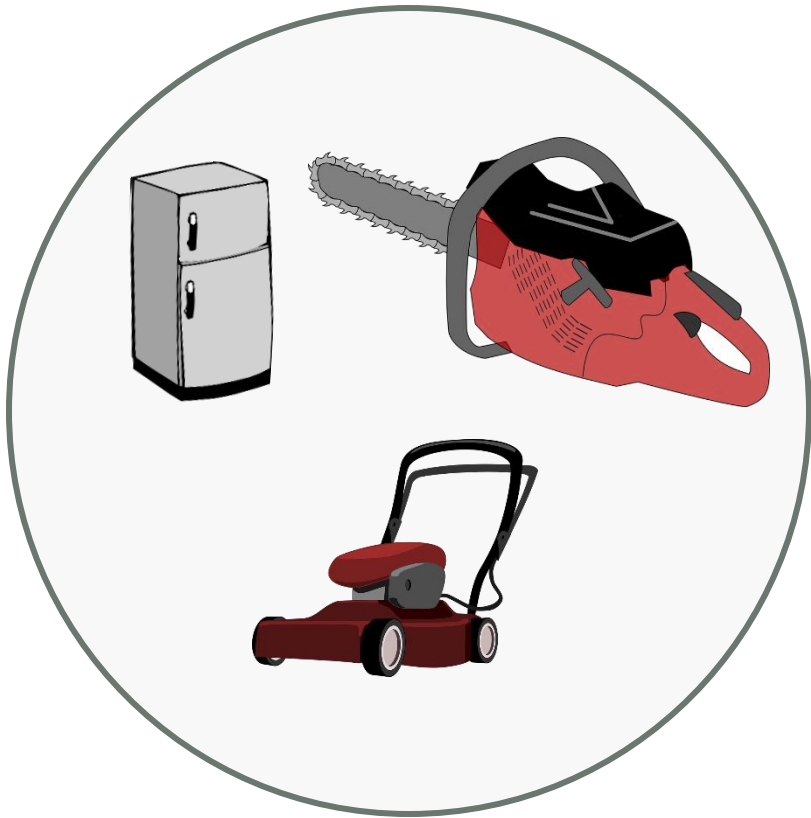
Track Inventory with Our New Serialization Feature

Charles Owen
Chief Experience Officer
January 21, 2020

WHAT YOU'LL LEARN

- What is product serialization?
- Common scenarios
- How serialization works in Paladin
 - Identifying serialized items
 - Receiving serialized items
 - Selling serialized items
 - Managing serial numbers
 - Serial Number List report
 - Multi-store serialized item transfers

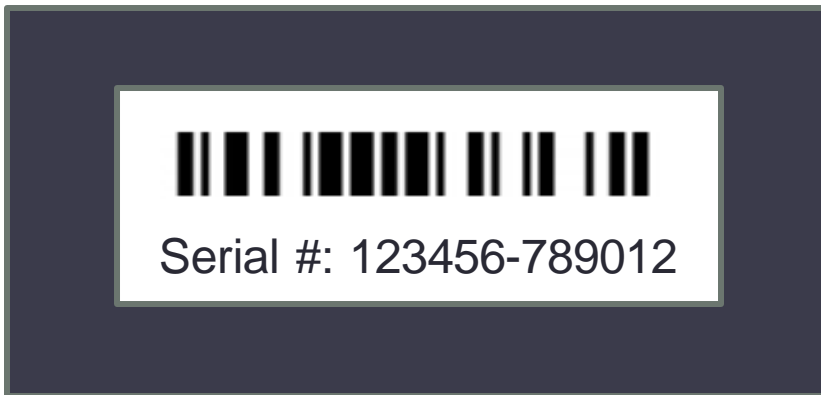
What is product serialization?



Product serialization is the process of assigning unique IDs or “serial numbers” to individual items in a product line.

Serial numbers are typically used for high-value products, such as power equipment, chainsaws, power tools, and appliances.

Common serialization scenarios



Serial numbers are useful in many scenarios including:

- Managing warranty coverage
- Maintaining ownership records
- Supplier traceability
- Enhanced accountability

How serialization works in Paladin

The Paladin serialization feature lets you maintain and track serial numbers for any product in your store.

- **PO Receive:** Serial numbers are added when items are received.
- **Invoice/Quote:** When a serialized item is sold or returned, the cashier is required to specify the serial number before the transaction can be completed.
- **Inventory:** A current list of in-stock serial numbers and a detailed serial number history and status is maintained for each inventory item.
- **Reports:** View a complete list of your serialized products and all their serial numbers in Paladin, including current serial number status.

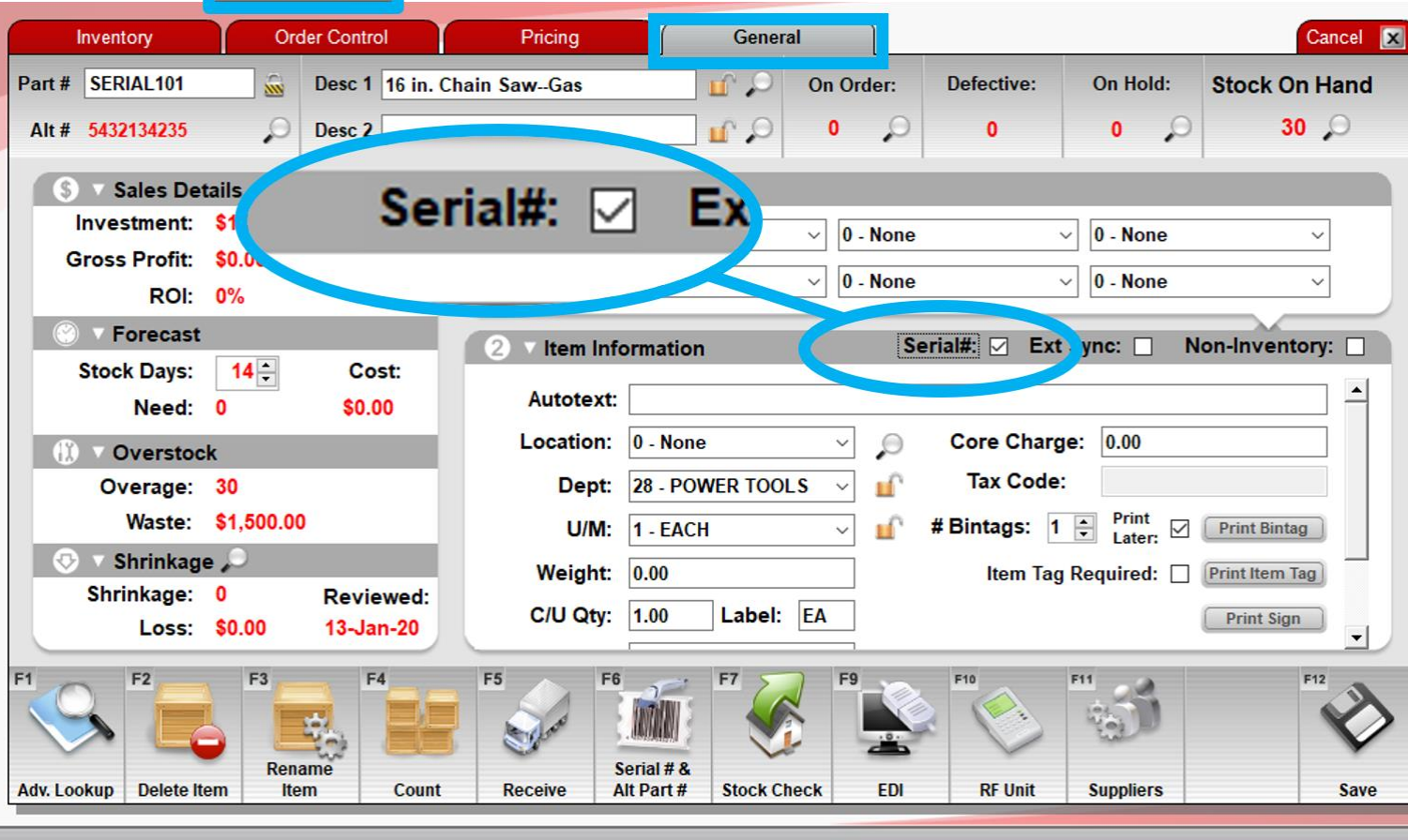
How serialization works in Paladin

- Paladin has incorporated multiple safeguards to help you maintain exactly one serial number for each serialized item in your inventory.
- Paladin prevents you from adding duplicate serial numbers to an item.
- Paladin maintains a detailed serial number history for every serial number event and status change.
- Paladin tracks not only the serial number, but also the date received and receiving cost of each serialized item.

Identifying serialized items

Inventory module

Identifying serialized items in your inventory

A screenshot of a software interface for inventory management. The 'General' tab is selected. The 'Part #' field contains 'SERIAL101' and 'Alt #' contains '5432134235'. The description is '16 in. Chain Saw--Gas'. The 'Stock On Hand' is 30. The 'Serial#' checkbox is checked. The 'Ext. sync' checkbox is unchecked. The 'Non-Inventory' checkbox is unchecked. The 'Item Information' section shows 'Autotext:', 'Location: 0 - None', 'Dept: 28 - POWER TOOLS', 'U/M: 1 - EACH', 'Weight: 0.00', 'C/U Qty: 1.00', 'Label: EA', 'Core Charge: 0.00', 'Tax Code:', '# Bintags: 1', 'Print Later: [checked]', 'Print Bintag', 'Print Item Tag', and 'Print Sign'. The bottom toolbar contains icons for Adv. Lookup, Delete Item, Rename Item, Count, Receive, Serial # & Alt Part #, Stock Check, EDI, RF Unit, Suppliers, and Save.

Inventory

Order Control

Pricing

General

Cancel

Part # SERIAL101

Alt # 5432134235

Desc 1 16 in. Chain Saw--Gas

Desc 2

On Order: 0

Defective: 0

On Hold: 0

Stock On Hand 30

Sales Details

Investment: \$1

Gross Profit: \$0.00

ROI: 0%

Forecast

Stock Days: 14

Cost: \$0.00

Need: 0

Overstock

Overage: 30

Waste: \$1,500.00

Shrinkage

Shrinkage: 0

Loss: \$0.00

Reviewed: 13-Jan-20

Item Information

Serial#: ☒ Ext. sync: ☐ Non-Inventory: ☐

Autotext:

Location: 0 - None

Dept: 28 - POWER TOOLS

U/M: 1 - EACH

Weight: 0.00

C/U Qty: 1.00

Label: EA

Core Charge: 0.00

Tax Code:

Bintags: 1

Print Later: ☒

Print Bintag

Print Item Tag

Print Sign

Adv. Lookup

Delete Item

Rename Item

Count

Receive

Serial # & Alt Part #

Stock Check

EDI

RF Unit

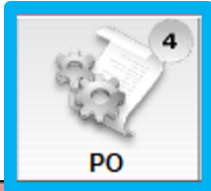
Suppliers

Save

To identify a product as a serialized item, in the **Inventory** module, on the **General** tab, select the **Serial#** checkbox.

Receiving items with serial numbers

PO module



Receiving items with serial numbers

Receive PO
Confirm Receive
Cancel

PO # 1234

Supplier 12 - MY BEST SUPPLIER

Address 2

Phone


EDI ☐


Address 1 100 Main Street


City/State/Zip Baltimore, MD, 21279-1047


Fax


Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH 10	3	\$ 50.000	\$ 150.00
	SERIAL101	<div style="display: flex; justify-content: space-between;"> <div>Old Cost: \$50.000 Ref Mar: 00%</div> <div>Old Sell: \$160.00 New Sell: \$160.00</div> <div>Mar: 69% Mar: 69%</div> </div>				
				SERIAL #		
<input type="checkbox"/>	PART1	HAMMER	EACH 40	40	\$ 10.000	\$ 400.00
	PART1	<div style="display: flex; justify-content: space-between;"> <div>Old Cost: \$10.000 Ref Mar: 00%</div> <div>Old Sell: \$20.00 New Sell: \$20.00</div> <div>Mar: 50% Mar: 50%</div> </div>		0		
<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE A/C	EACH 5	5	\$ 150.000	\$ 750.00
	SERIAL102	<div style="display: flex; justify-content: space-between;"> <div>Old Cost: \$150.000 Ref Mar: 00%</div> <div>Old Sell: \$300.00 New Sell: \$300.00</div> <div>Mar: 50% Mar: 50%</div> </div>				
				SERIAL #		
<input type="checkbox"/>			ORD			
			REC			


F1  Advanced Lookup


F2  Add Note


F3  Zero Qty Received

F4  Displaying Open | All

F5  Recall Inventory

F6  Find PO

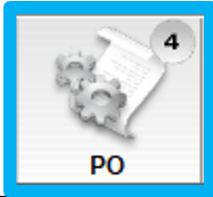
F7  Review RF Receiving

F8  Process

Total \$ 1,300.00

In the **PO** module, when you receive serialized items you must add serial numbers before you can process the PO.

A red **Serial #** warning indicates that the PO item needs serial numbers.



Receiving items with serial numbers

Receive PO

Confirm Receive

Cancel

PO # 1234

Supplier 12 - MY BEST SUPPLIER

Address 2

Phone

EDI

Address 1 100 Main Street

City/State/Zip Baltimore, MD, 21279-1047

Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input checked="" type="checkbox"/>	SERIAL101	16 in. Chain Saw—Gas	EACH	10	3	\$ 50.000
	SERIAL101			0	SERIAL #	\$ 150.00
<input type="checkbox"/>	PART1			40	40	\$ 10.000
	PART1			0		\$ 400.00
<input type="checkbox"/>	SERIAL102	20,000 BTU		5	5	\$ 150.000
	SERIAL102			0	SERIAL #	\$ 750.00
		Old Cost: \$150.000 Old Sell: \$300.00 Mar: 50% Ref Mar: 00% New Sell: \$300.00 Mar: 50%				
<input type="checkbox"/>			ORD			
			REC			

F1

F2

F3

F4

F5

F6

F7

F8

Advanced Lookup

Add Note

Zero Qty Received

Displaying Open | All

Recall Inventory

Find PO

Review RF Receiving

Process

Total \$

1,300.00

You can add, edit and view serial numbers using the quick access (right-click) menu.

- **Add Serial #:** Opens the **Add/Remove Serial Numbers** window.
- **Find Next Serial # Warning:** Moves to the next PO item that needs serial numbers.

Receiving items with serial numbers



Receive PO		Confirm Receive		Cancel [X]
PO # 1234	Supplier 12 - MY BEST SUPPLIER	Address 2	Phone	
EDI <input type="checkbox"/>	Address 1 100 Main Street	City/State/Zip Baltimore, MD, 21279-1047	Fax	

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input checked="" type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH 10	3	\$ 50.000	\$ 150.00
Add/Remove Serial Numbers						
<input type="checkbox"/>			0	SERIAL #		
<input type="checkbox"/>			40	40	\$ 10.000	\$ 400.00
<input type="checkbox"/>			0			
<input type="checkbox"/>			5	5	\$ 150.000	\$ 750.00
<input type="checkbox"/>			0	SERIAL #		
<input type="checkbox"/>			RD			
<input type="checkbox"/>			EC			

F1	F8
Advanced Lookup	Process
Add Note	Total \$ 1,300.00
Zero Qty Received	
Displaying Open All	
Recall Inventory	
Find PO	
Review RF Receiving	

Right-click a serialized item and select **Add Serial #** to open the **Add/Remove Serial Numbers** window.

Enter or scan serial numbers to
add them to the item.

As you add serial numbers, the required number in the message decreases:

Add ## serial numbers.

Receiving items with serial numbers



Receive PO
Confirm Receive
Cancel


PO #
 EDI ☐


Supplier
 Address 1


Address 2
 City/State/Zip


Phone
 Fax


Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	10	3	\$ 50.000	\$ 150.00
	SERIAL101	Old Cost: \$50.00 Ref Mar: 00%				
		Required serial #'s added → SERIAL #				
<input type="checkbox"/>	PART1	HAMMER	40	40	\$ 10.000	\$ 400.00
	PART1	Old Cost: \$10.000 Old Sell: \$20.00 Mar: 50% Ref Mar: 00% New Sell: \$20.00 Mar: 50%	0			
<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE A/C	5	5	\$ 150.000	\$ 750.00
	SERIAL102	Old Cost: \$150.000 Old Sell: Needs serial #'s → SERIAL # Ref Mar: 00% New Sell:				
<input type="checkbox"/>			ORD			
			REC			


F1 
Advanced
Lookup


F2 
Add
Note


F3 
Zero Qty
Received

F4 
Displaying
Open | All

F5 
Recall
Inventory

F6 
Find PO

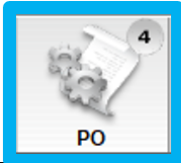
F7 
Review
RF Receiving

F8 
Process

Total \$ 1,300.00

When the required serial numbers are entered for an item, the **Serial #** label turns from red to black.

Receiving items with serial numbers



Receive PO

Confirm Receive

Cancel

PO # 1234

Supplier 12 - MY BEST SUPPLIER

Address 2

Phone

EDI

Address 1 100 Main Street


City/State/Zip Baltimore, MD, 21279-1047

Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH	10	7 \$ 50.000	\$ 350.00

Add/Remove Serial Numbers

Cancel



Add 6 serial numbers

Enter Serial #:

Add

Edit

Remove

Serial #	Status
Y92453298	Pending Receive
A23424234	Received
Y43256890	Received
D232322242	Received

F12 Finish

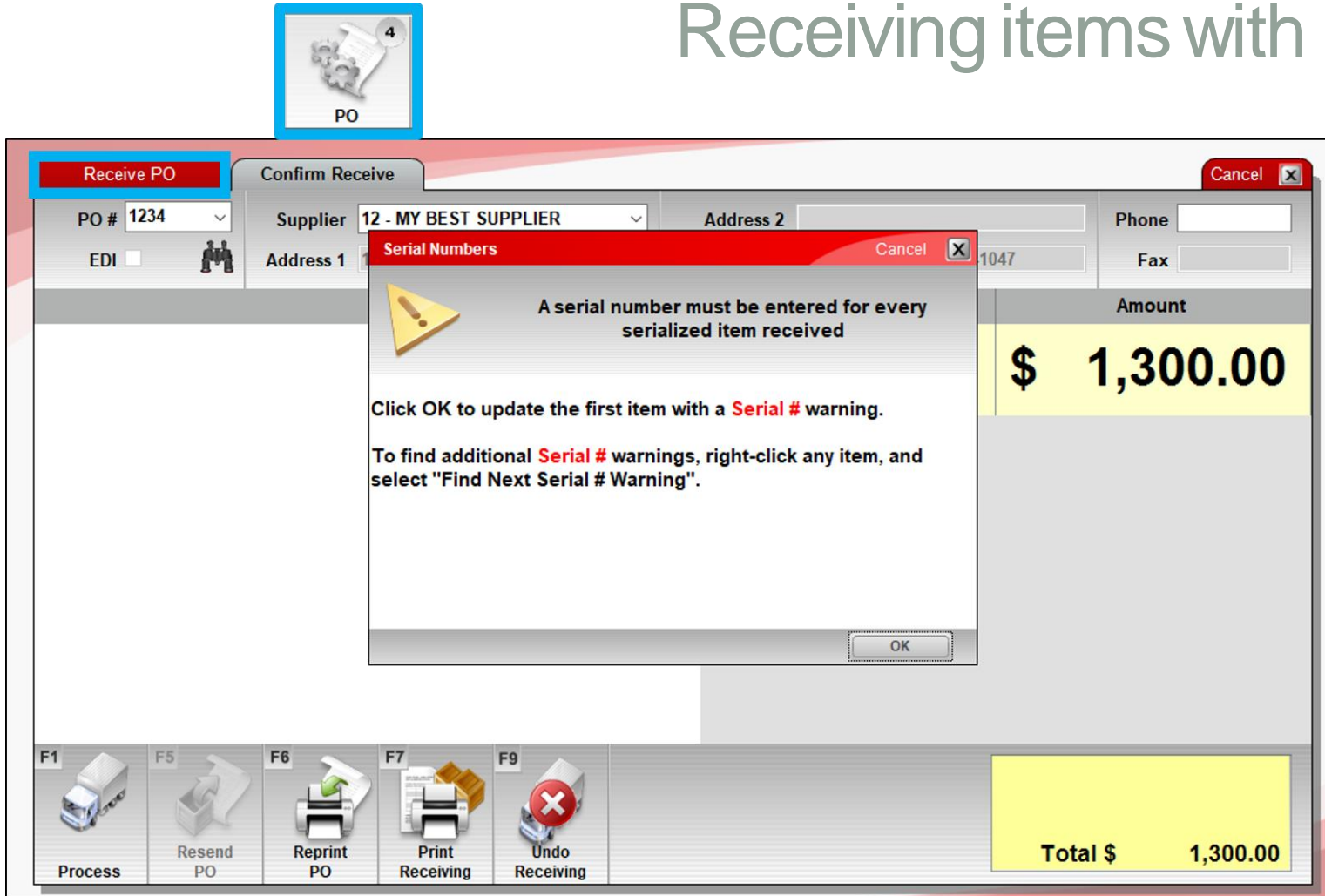
Serial #

Total \$

350.00

Serial numbers previously received on a partially-received PO, will appear in light gray with a **Status of Received** and cannot be edited.

Receiving items with serial numbers



The screenshot shows the 'Receive PO' software interface. A blue box highlights the 'PO' icon in the top left corner. The main window has a 'Receive PO' tab and a 'Confirm Receive' sub-tab. The 'PO #' field is set to 1234, and the 'Supplier' is 12 - MY BEST SUPPLIER. A red dialog box titled 'Serial Numbers' is overlaid on the screen, displaying a warning message: 'A serial number must be entered for every serialized item received'. The dialog also includes instructions: 'Click OK to update the first item with a Serial # warning.' and 'To find additional Serial # warnings, right-click any item, and select "Find Next Serial # Warning".' The background window shows a table with columns for 'Amount' and 'Total \$', with values of \$ 1,300.00 and 1,300.00 respectively. The bottom toolbar contains icons for 'Process', 'Resend PO', 'Reprint PO', 'Print Receiving', and 'Undo Receiving'.

PO

Receive PO

Confirm Receive

PO # 1234

Supplier 12 - MY BEST SUPPLIER

Address 2

Phone

Fax

EDI

Address 1

Serial Numbers

A serial number must be entered for every serialized item received

Click OK to update the first item with a **Serial #** warning.

To find additional **Serial #** warnings, right-click any item, and select "Find Next Serial # Warning".

Amount

\$ 1,300.00

Total \$ 1,300.00

F1 Process

F5 Resend PO

F6 Reprint PO

F7 Print Receiving

F9 Undo Receiving

You must resolve all **Serial #** warnings before you can process a PO.

As a safeguard, if you try to process a PO. without the correct number of serial numbers, a message appears and you will be taken to the first item with a **Serial #** warning.

Selling items with serial numbers

Invoice/Quote module

Selling items with serial numbers



Invoice / Quote **Checkout** Cancel

Rewards: 99887766558 Customer: 6295 - JOHN SMITH Address 2: Phone: Credit: 0.00 Address 1: 1500 MAIN AVE City/State/Zip: NICE CITY, KS, 00000 Fax:

Tax	Def	Net	Part	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL		40	0	160.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SOH	ORD			

Add Serial Numbers Cancel

Enter or select 1 serial number for part # 'SERIAL101'

Enter Serial Number:

Available Serial Numbers:

- B24039542
- N24531215
- D23232242
- E98765432
- P92384859
- I12RE2341
- YISADFA1
- N31OIOU4
- Y12SRE12
- NWA4239
- PA134110
- F12342882L
- IIISOR1219

Selected Serial Numbers:

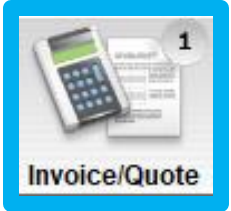
- A23424234

Select >>> <<< Remove F12 Finish

Advanced Lookup **Add Note** **Delete Line Item** **Discount Item** **Account Payment** **Store Transaction** **Stock Check** **Checkout**

Total \$	160.00
Tax \$	12.80
Total \$	172.80

In the **Invoice/Quote** module, when a cashier adds a serialized item to an invoice, they will be prompted to select a serial number from the available serial numbers for that item.



Selling items with serial numbers

Add Serial Numbers

Enter or select 1 serial number for part # 'SERIAL1'

Enter Serial Number

Available Serial Numbers


A23424234
B24039542
N24531215
D23232242
E98765432
P92384859
I12RE2341
YISADFA1
N31OIOU4
Y12SRE12
NWA4239
PA134110
F123428821

Select >>> <<< Remove

Selected Serial: W98213489

F12 Finish

Add Serial Number [Cancel] [X]

 **Serial number not found on this item**

Do you want to add the new serial number 'J31489002' to this item?

Caution: Serial numbers are not typically added at the time of sale. Make sure the serial number is correct


Manager password required:

[Cancel] [Add]

If the serial number does not appear in the list, you can enter it manually with manager approval.

Selling items with serial numbers

Selling items with

 1
Invoice/Quote

Invoice / Quote		Checkout		Cancel X	
Rewards <input type="text" value="99887766558"/>	Customer <input type="text" value="6295 - JOHN SMITH"/>	Address 2 <input type="text"/>		Phone <input type="text"/>	
Credit <input type="text" value="0.00"/>	Address 1 <input type="text" value="1500 MAIN AVE"/>	City/State/Zip <input type="text" value="NICE CITY, KS, 00000"/>		Fax <input type="text"/>	

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL101	16 IN. CHAIN SAW--GAS	EACH	\$ 160.00	\$ 320.00
			SERIAL101				
37		0					
				Serial #: A23424234			
				Serial #: B24039542			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE	CH	\$ 300.00	\$ 300.00
			SERIAL102				
22		0					

Required serial #'s added

Needs serial #'s

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
SOH	ORD						

Subtotal \$	620.00
Tax \$	49.60
Total \$	669.60

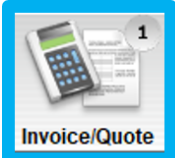
F1	F2	F3	F4	F5	F6	F7	F8
Advanced Lookup	Add Note	Delete Line Item	Discount Item	Account Payment	Store Transaction	Stock Check	Checkout

Serialized items are identified by a **SERIAL #** label.

Selected serial numbers are added as line items on the invoice.

A red **SERIAL #** warning indicates that the item does not have the required number of serial numbers.

Selling items with serial numbers



Invoice / Quote

Checkout

Cancel

Rewards 99887766558

Customer 6295 - JOHN SMITH

Address 2

Phone

Credit 0.00

Address 1 1500 MAIN AVE

City/State/Zip NICE CITY, KS, 00000

Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Serial #: B24039542				
NOTES							
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE A/C	1	\$ 300.00	\$ 300.00
22	0		SERIAL102				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART1	HAMM			
134	1		PART1				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2	BUZZ S			
100	0		PART2				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
SOH			ORD				

F1

F2

F3

F4

Advanced Lookup

Add Note

Delete Line Item

Dis

F8

Checkout

Subtotal \$ 692.00

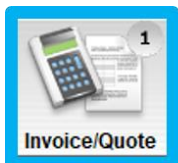
Tax \$ 55.36

Total \$ 747.36

You can also add, edit and view serial numbers using the quick access (right-click) menu.

- **Add Serial #:** Opens the **Add/Remove Serial Number** window.
- **Find Next Serial #**
Warning: Moves to the next invoice item that needs serial numbers.

Selling items with serial numbers



1
Invoice/Quote

Invoice / Quote

Checkout

Rewards 99887766558

Credit 0.00

Customer 6295 - JOHN SMITH

Address 1

Address 2

Phone

Fax

Amount

\$ 747.36

Subtotal \$ 692.00

Tax \$ 55.36

Total \$ 747.36

F1 Cash

F2 Charge

F3 Credit Card

F4 Check

F5 Coupon

F6 Store Transaction

F7 Print Quote

F8 Tax

F10 Schedule Delivery

Serial Numbers

A serial number must be entered for every serialized item sold

Click OK to update the first item with a **Serial #** warning.

To find additional **Serial #** warnings, right-click any item, and select "Find Next Serial # Warning".

OK

You must resolve all **Serial #** warnings before you can process an invoice.

As a safeguard, if you try to process an invoice without the correct number of serial numbers, a message appears and you will be taken to the first item with a **Serial #** warning.

Selling items with serial numbers

Serial numbers will appear on the customer's receipt for easy reference.

Your Hardware Store

Thank you for shopping with us!

Your Hardware Store
1000 Ace Lane
Happyville, TX 12345
(123) 456-7890

JOHN SMITH
1500 MAIN AVE
NICE CITY, KS 00000
ACCOUNT # 1 6295

ITEM	QTY	SALE/REG	EXT
SERIAL101	2.00	160.00	320.00
EACH			
16 IN. CHAIN SAW--GAS			
Serial #: A23424234			
Serial #: B24039542			
SERIAL102	1.00	300.00	300.00
EACH			
20,000 BTU PORTABLE A/C			
Serial #: YWER23U			
PART1	1.00	20.00	20.00
EACH			
HAMMER			
PART2	2.00	26.00	52.00
EACH			
BUZZ SAW			

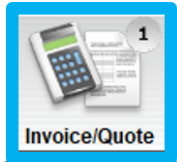
SUBTOTAL \$	692.00
TAX \$	55.36
TOTAL \$	747.36

CASH 747.36

EMPLOYEE	TERM	INV#	TIME	DATE
1	11	61316	05:42	20-Jan-20

ITEM	QTY	SALE/REG	EXT
SERIAL101	2.00	160.00	320.00
EACH			
16 IN. CHAIN SAW--GAS			
Serial #: A23424234			
Serial #: B24039542			
SERIAL102	1.00	300.00	300.00
EACH			
20,000 BTU PORTABLE A/C			
Serial #: YWER23U			

Selling items with serial numbers



Invoice / Quote **Checkout** Cancel X

Rewards Customer Address 2 Phone

Credit Address 1 City/State/Zip Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH	-1	\$ 160.00
							\$ -160.00

38 **Return Serial Numbers** Cancel X

Enter or select 1 serial number for returned part # 'SERIAL101'

Enter Serial Number

Sold Serial Numbers Selected Serial Numbers

A123457890

F12 Finish

Subtotal \$ -160.00

Tax \$ -12.80

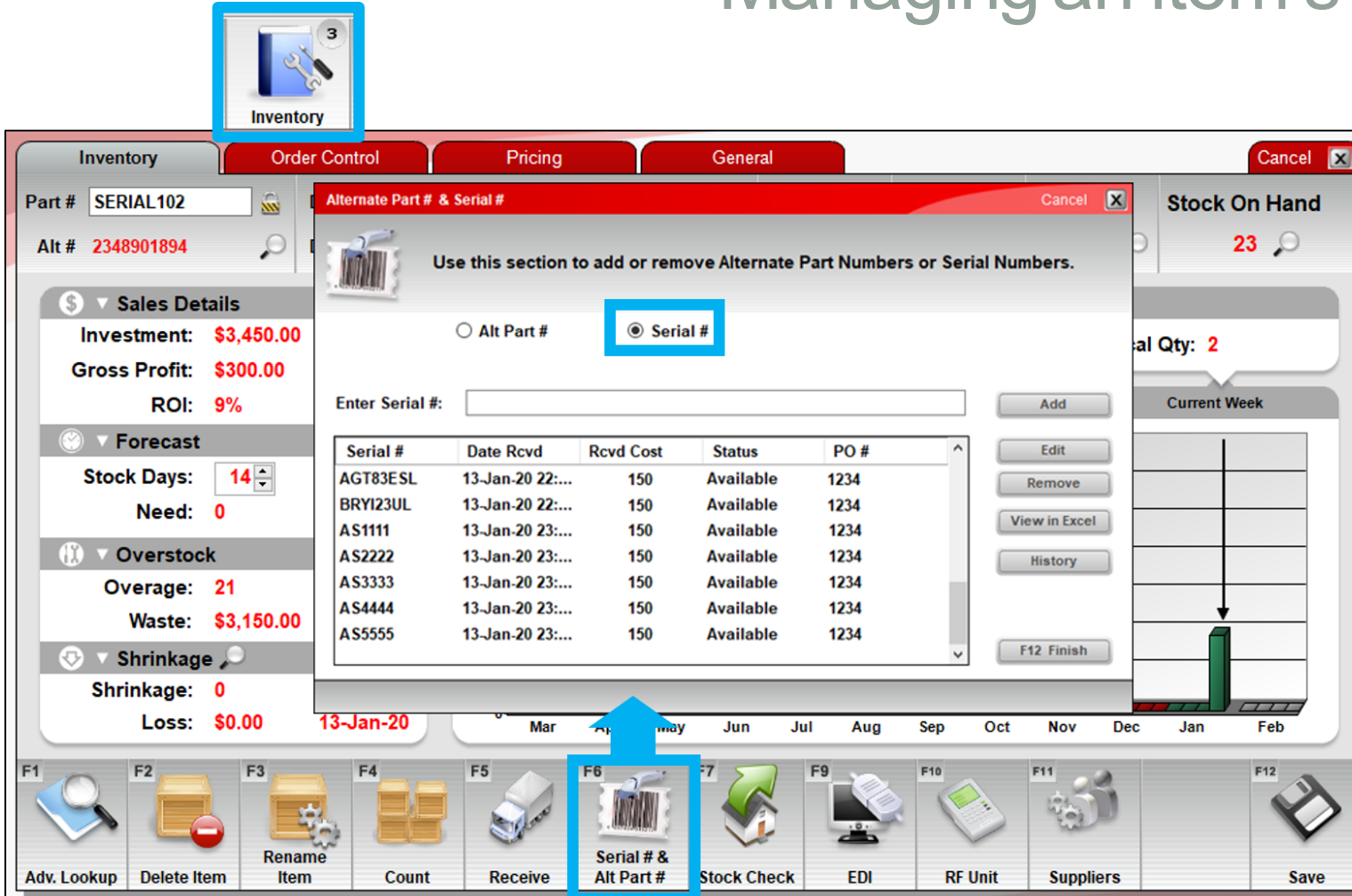
Total \$ -172.80

When a customer returns a serialized item, the cashier must select the serial number from this list of **Sold Serial Numbers** for that item.

The return cannot be processed until a serial number is selected.

Managing an item's serial numbers Inventory module

Managing an item's serial numbers



The screenshot shows the 'Inventory' module interface. A blue box highlights the 'Inventory' icon in the top left. The 'Alternate Part # & Serial #' dialog box is open, showing the 'Serial #' tab selected. The dialog contains a table of serial numbers and their details.

Serial #	Date Rcvd	Rcvd Cost	Status	PO #
AGT83ESL	13-Jan-20 22:...	150	Available	1234
BRYI23UL	13-Jan-20 22:...	150	Available	1234
AS1111	13-Jan-20 23:...	150	Available	1234
AS2222	13-Jan-20 23:...	150	Available	1234
AS3333	13-Jan-20 23:...	150	Available	1234
AS4444	13-Jan-20 23:...	150	Available	1234
AS5555	13-Jan-20 23:...	150	Available	1234

The bottom toolbar includes icons for various functions: F1 (Adv. Lookup), F2 (Delete Item), F3 (Rename Item), F4 (Count), F5 (Receive), F6 (Serial # & Alt Part #), F7 (Stock Check), F9 (EDI), F10 (RF Unit), F11 (Suppliers), and F12 (Save). A blue arrow points to the 'Serial # & Alt Part #' icon (F6).


In the **Inventory** module, you can view and edit an item's available (in-stock) serial number list.

You can also access a detailed serial number history and view the serial number information in Excel.

Managing an item's serial numbers



Alternate Part # & Serial #

Use this  ☐ Alt F

Enter Serial #:

Serial #	Date Rcvd	Rcvd Cost	Status	PO #
AGT83ESL	13-Jan-20 22:...	150	Available	1234
BRYI23UL	13-Jan-20 22:...	150	Available	1234
AS1111	13-Jan-20 23:...	150	Available	1234
AS2222	13-Jan-20 23:...	150	Available	1234
AS3333	13-Jan-20 23:...	150	Available	1234
AS4444	13-Jan-20 23:...	150	Available	1234
AS5555	13-Jan-20 23:...	150	Available	1234

Buttons:

AutoSave ☐ Off

Book2 - Excel

File Home Insert Draw Page Layout Formulas Data Review View Add-ins Help Team Tell me

A4 4312AADA

	A	B	C	D	E
1	Partnumber: SERIAL102	Description: 20,000 BTU PORTABLE A/C	Avg Cost: \$150.00	Retail: \$300.00	Report Date: 20-Jan-20 11:59:46 AM
2					
3	Serial #	Date Rcvd	PO #	Rcvd Cost	Status
21	AS1111	13-Jan-20 11:42:27 PM	1234	150.000	Available
22	AS2222	13-Jan-20 11:42:27 PM	1234	150.000	Available
23	AS3333	13-Jan-20 11:42:27 PM	1234	150.000	Available
24	AS4444	13-Jan-20 11:42:27 PM	1234	150.000	Available
25	AS5555	13-Jan-20 11:42:27 PM	1234	150.000	Available

Sheet1

Ready Display Settings 100%

To view the available serial number information in a spreadsheet, click **View in Excel** in the **Alternate Part # & Serial #** window.

Managing an item's serial numbers



Alternate Part # & Serial #

Use this section to enter an alternate part number or serial number for an item.

☐ Alt Part #

Enter Serial #:

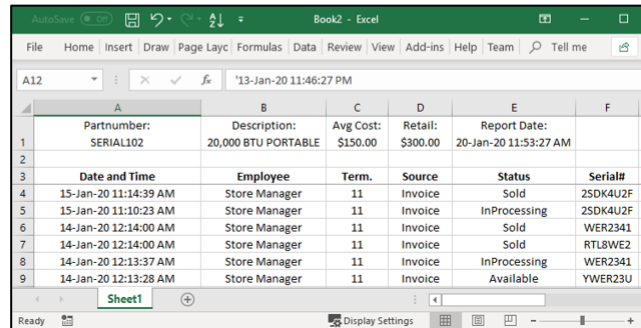
Serial #	Date Rcvd	Qty	Status	PO #
AGT83ESL	13-Jan-20 22:...	150	Available	1234
BRYI23UL	13-Jan-20 23:...	150	Available	1234
AS1111	13-Jan-20 23:...	150	Available	1234
AS2222	13-Jan-20 23:...	150	Available	1234
AS3333	13-Jan-20 23:...	150	Available	1234
AS4444	13-Jan-20 23:...	150	Available	1234
AS5555	13-Jan-20 23:...	150	Available	1234

F12 Finish

Serial Number History													Cancel
Date	Time	Employee	Term.	Source	Inv Id	Serial#	Status	Memo	Invoice Id	Cust Id	Store Id	PO #	
14-Jan-20	00:14	Store M...	11	Invoice	44522	WER2341	Sold	Created...	61311	6295	0		
14-Jan-20	00:14	Store M...	11	Invoice	44522	RTL8WE2	Sold	Created...	61311	6295	0		
14-Jan-20	00:13	Store M...	11	Invoice	44522	WER2341	InProce...	Created...	-1	-1	0		
14-Jan-20	00:13	Store M...	11	Invoice	44522	YWER23U	Available	Previou...	-1	-1	0		
14-Jan-20	00:13	Store M...	11	Invoice	44522	YWER23U	InProce...	Previou...	-1	-1	0		
14-Jan-20	00:08	Store M...	11	Invoice	44522	RTL8WE2	InProce...	Created...	-1	-1	0		
13-Jan-20	23:46	Store M...	11	Manual	44522	AS2222	Available	Previou...	-1	-1	0	1234	
13-Jan-20	23:46	Store M...	11	Manual	44522	AS1111	Available	Previou...	-1	-1	0	1234	
13-Jan-20	23:45	Store M...	11	Manual	44522	AS93U420	Available	Previou...	-1	-1	0	1234	
13-Jan-20	23:45	Store M...	11	Manual	44522	AS1IEWF1	Available	Previou...	-1	-1	0	1234	
13-Jan-20	23:42	Store M...	11	PO_REC	44522	AS1111	Available		-1	-1	0	1234	
13-Jan-20	23:42	Store M...	11	PO_REC	44522	AS2222	Available		-1	-1	0	1234	
13-Jan-20	23:42	Store M...	11	PO_REC	44522	AS3333	Available		-1	-1	0	1234	

Serial Number History

View in Excel **Done**

Partnumber:	Description:	Avg Cost:	Retail:	Report Date:	Serial#	Inv
SERIAL102	20,000 BTU PORTABLE	\$150.00	\$300.00	20-Jan-20 11:53:27 AM		
Date and Time	Employee	Term.	Source	Status	Serial#	Inv
15-Jan-20 11:14:39 AM	Store Manager	11	Invoice	Sold	25DK4U2F	443
15-Jan-20 11:10:23 AM	Store Manager	11	Invoice	InProcessing	25DK4U2F	443
14-Jan-20 12:14:00 AM	Store Manager	11	Invoice	Sold	WER2341	443
14-Jan-20 12:14:00 AM	Store Manager	11	Invoice	Sold	RTL8WE2	443
14-Jan-20 12:13:37 AM	Store Manager	11	Invoice	InProcessing	WER2341	443
14-Jan-20 12:13:28 AM	Store Manager	11	Invoice	Available	YWER23U	443

The **Serial Number History** viewer (**click History**) provides detailed documentation and transparency for all events that involve a serial number.

To review this information in an Excel spreadsheet, at the bottom of the **History** viewer window, click **View in Excel**.

Managing an item's serial numbers



Inventory | Order Control | Pricing | General | Cancel

Part # SERIAL101 Desc 1 16 in. Chain Saw--Gas On Order: 0 Defective: 0 On Hold: 0 **Stock On Hand** 38

Alt # 5432134235 Desc 2

Alternate Part # & Serial # Cancel

Use this section to add or remove Alternate Part Numbers or Serial Numbers.

☐ Alt Part # ☒ Serial #

Remove 1 serial # to match inventory.

Enter Serial #:

Serial #	Date Rcvd	Rcvd Cost	Status	PO #
Y92453298	13-Jan-20 23:...	50	Available	1234
Z98293471	13-Jan-20 23:...	50	Available	1234
N29843201	13-Jan-20 23:...	50	Available	1234
T14312987	13-Jan-20 23:...	50	Available	1234
Y31194932	13-Jan-20 23:...	50	Available	1234
T23480092	13-Jan-20 23:...	50	Available	1234
M2134232	13-Jan-20 23:...	50	Available	1234
Y43256890	14-Jan-20 21:...		Available	

Add Edit Remove View in Excel History F12 Finish

Typical Qty: 2

Current Week

Oct Nov Dec Jan Feb

Unit Suppliers Save

The number of available serial numbers should equal your stock on hand (SOH) quantity.

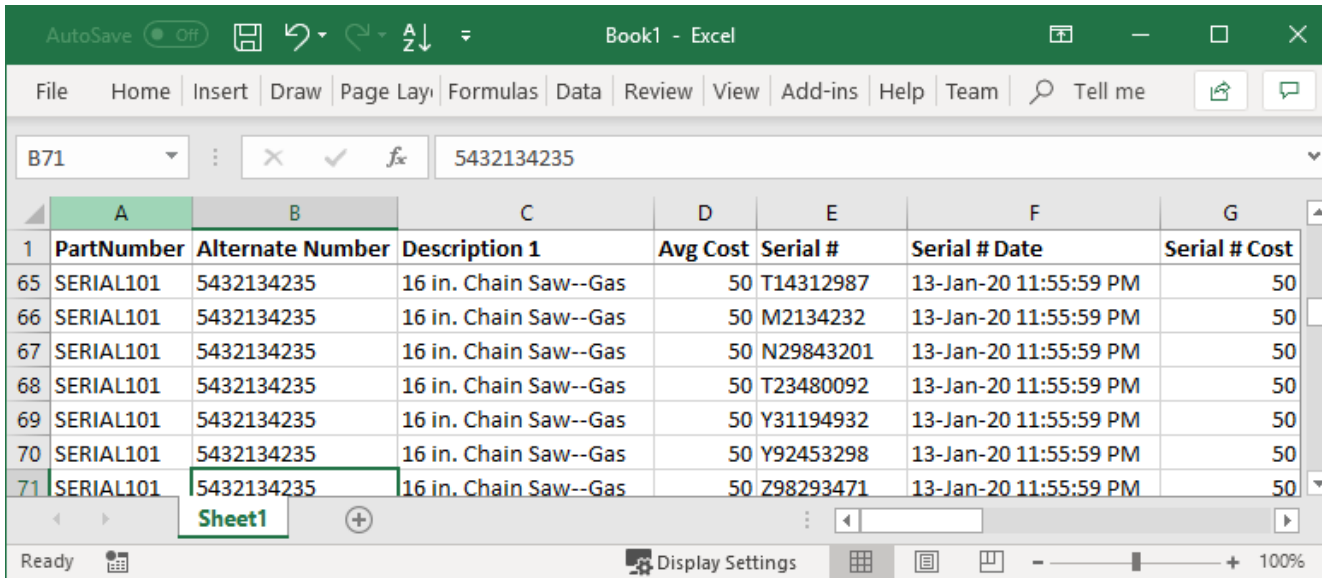
If there are too many or too few serial numbers for an item, a yield button with an exclamation point appears in the Inventory module next to the **SOH** value.

Click this button to view and address the discrepancy.

Serial Number Reporting

Reports module

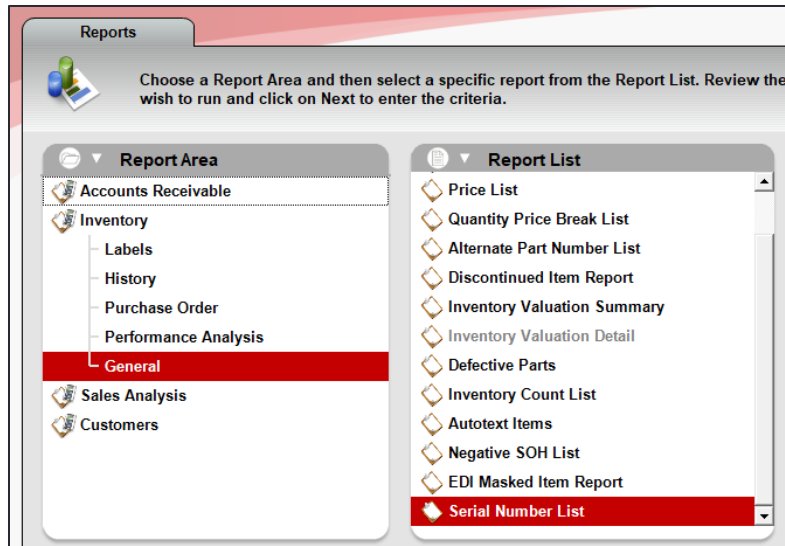
Serial Number List Report



	A	B	C	D	E	F	G
1	PartNumber	Alternate Number	Description 1	Avg Cost	Serial #	Serial # Date	Serial # Cost
65	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	T14312987	13-Jan-20 11:55:59 PM	50
66	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	M2134232	13-Jan-20 11:55:59 PM	50
67	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	N29843201	13-Jan-20 11:55:59 PM	50
68	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	T23480092	13-Jan-20 11:55:59 PM	50
69	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Y31194932	13-Jan-20 11:55:59 PM	50
70	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Y92453298	13-Jan-20 11:55:59 PM	50
71	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Z98293471	13-Jan-20 11:55:59 PM	50

The **Serial Number List** Report provides a itemized list of serialized items and their serial numbers including:

- Serialized Part # & Alt Part #
- Serialized item description
- Serial #'s (one serial # per line)
- Serial # added/received date
- Current serial # status (Available, Sold, etc.)
- Supplier cost when serial # was received (if available)
- Received PO # (if available)



Serial Number List Report

The **Serial Number List** Report is available in the **Reports** module, in the **Inventory > General** category.

You can filter your report by specifying inventory item parameters in the **Report Settings** pane.

Serial Number List		
1 Report Settings		
Selection	Beginning	Ending
PartNumber		zzzzzzzzzzzzzzzz
Department	0	99999999
Supplier	0	99999999
Class	0	99999999
SubClass	0	99999999
Location	0	99999999

Multi-store serialized item transfers

PO and Inventory modules

Multi-store serialized item transfers: PO module



Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Greenville 9 Paladin Support 15-Jan-20

Receive PO Confirm Receive Cancel

PO # 8000186 Supplier 2 - Anderson Address 2 Phone Fax

Add/Remove Serial Numbers Cancel

Add 2 serial numbers

Available Serial Numbers:

222
333
444

Add >>>
<<< Remove

Selected Serial Numbers:

F12 Finish

ve	Cost	Extension
2	\$ 1.000	\$ 2.00

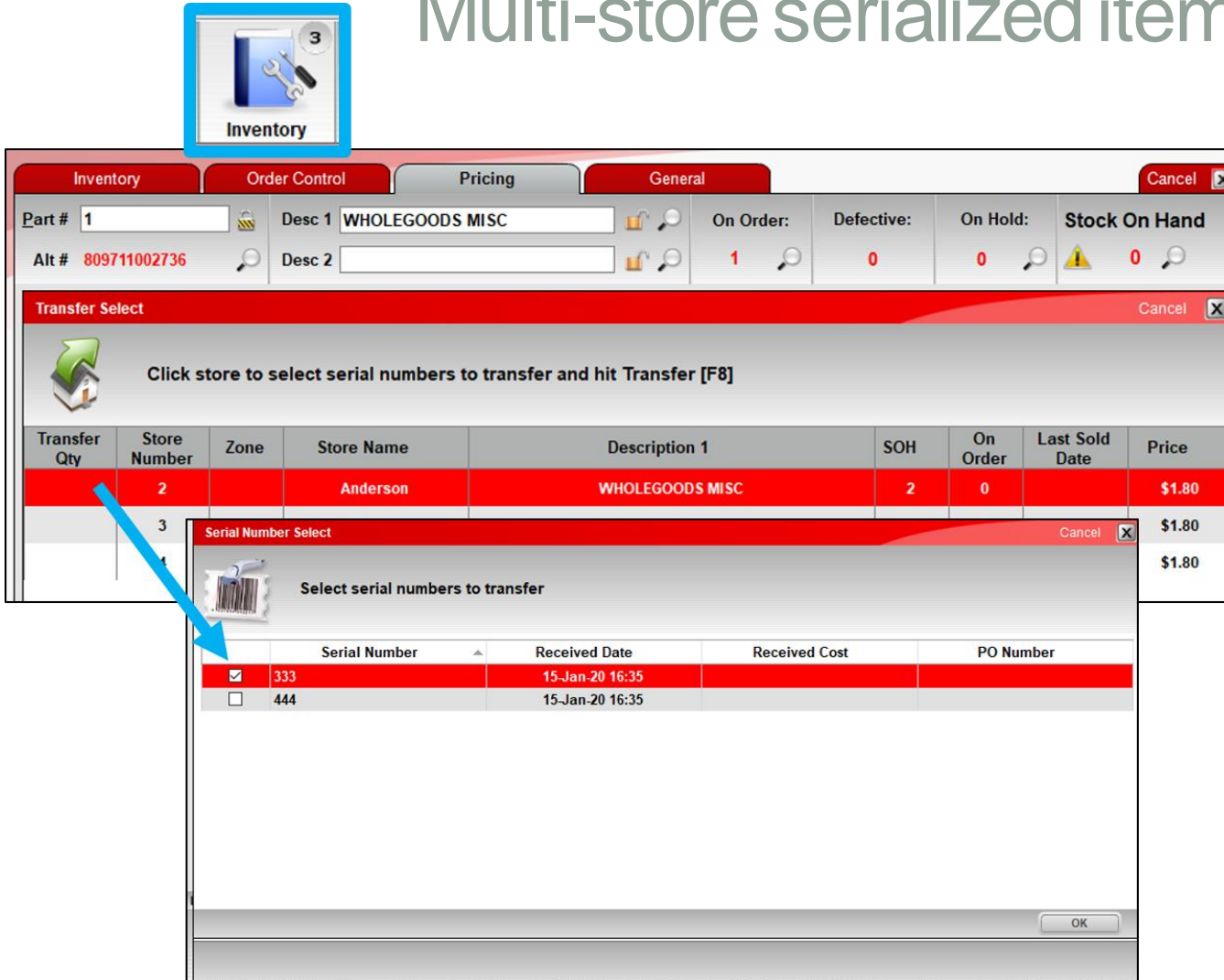
F1 Advanced Lookup F2 Add Note F3 Zero Qty Received F4 Displaying Open | All F5 Recall Inventory F6 Find PO F7 Review RF Receiving F8 Process

Total \$ 2.00

Scenario 1: A store creates a PO to to transfer an item from another store.

When the item is received, the store must select the item's serial number from the other store's **Available Serial Numbers** list.

Multi-store serialized item transfers: Inventory F7 Transfer



The screenshot shows the 'Inventory' module interface. At the top, there's a ribbon with 'Inventory', 'Order Control', 'Pricing', and 'General'. The 'Inventory' tab is active. Below the ribbon, there's a 'Transfer Select' dialog box. It contains a table with columns: Transfer Qty, Store Number, Zone, Store Name, Description 1, SOH, On Order, Last Sold Date, and Price. A blue arrow points to the 'Transfer Qty' column. Below this, a 'Serial Number Select' dialog box is open, showing a table with columns: Serial Number, Received Date, Received Cost, and PO Number. The 'Serial Number' column has a checkbox next to it. The table lists two serial numbers: 333 and 444, both received on 15-Jan-20 at 16:35. The 'OK' button is at the bottom right of the 'Serial Number Select' dialog.

Inventory

Part # 1 Desc 1 WHOLEGOODS MISC On Order: 1 Defective: 0 On Hold: 0 Stock On Hand 0

Alt # 809711002736 Desc 2

Transfer Select

Click store to select serial numbers to transfer and hit Transfer [F8]

Transfer Qty	Store Number	Zone	Store Name	Description 1	SOH	On Order	Last Sold Date	Price
	2		Anderson	WHOLEGOODS MISC	2	0		\$1.80
	3							\$1.80
	4							\$1.80

Serial Number Select

Select serial numbers to transfer

Serial Number	Received Date	Received Cost	PO Number
<input checked="" type="checkbox"/> 333	15-Jan-20 16:35		
<input type="checkbox"/> 444	15-Jan-20 16:35		

OK

Scenario 2: A store uses the uses the F7 transfer feature (bottom ribbon in the **Inventory** module) to transfer an item from another store.

When the request is made, the receiving store must select a specific serial number to transfer.

The PO that is created includes the selected serial number in a note.



Multi-store serialized item transfers: Inventory F7 Transfer

Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Greenville 9 Paladin Support 15-Jan-20

Receive PO Confirm Receive Cancel

PO # 8000189 Supplier 2 - Anderson Address 2 Phone
EDI Address 1 City/State/Zip Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input checked="" type="checkbox"/>	1	WHOLEGO				
	1	Old Cost: \$0 Ref Mar: 00				
<input type="checkbox"/>	Name: Test Name					
<input type="checkbox"/>	Phone: 555-123-4567					
<input type="checkbox"/>	Memo: Demo Memo					
<input type="checkbox"/>	Requesting Serial #: 333					

Add/Remove Serial Numbers Cancel

Add 0 serial numbers

Available Serial Numbers: 444 Add >> Selected Serial Numbers: 333 <<< Remove

F1 Advanced Lookup F2 Add Note F3 Zero Qty Received F12 Finish

When item is received, the serial number is automatically selected on the PO, but can be changed.



Check out our [Winter 2019-2020 Release Guide](#)
on the Help Portal.

Expand your Paladin Knowledge:

Stay relevant in retail:
paladinpointofsale.com/retailsience

Self help at:
portal.paladinpos.com

Webinars available at:
portal.paladinpos.com/webinars

Follow us for Paladin news and updates:

